State of Oklahoma
Department of Central Services
Central Purchasing

Item Maintenance Template Instructions

Agencies requesting Item IDs must fill out an Item Upload Spreadsheet to include the required information and submit to the Item Maintenance team. They will load the items into the system and obtain PeopleSoft Item Ids from the system. The new Item IDs will then be forwarded back to the agency via email.

<u>These instructions must be followed very carefully</u>. Errors in the Excel spreadsheet will prevent the items from being uploaded until the error is resolved.
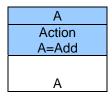
Only certain columns will need to be completed. These columns are highlighted in blue. All gray columns should <u>not</u> be altered or include any type of data. All data for a single item MUST be on a single row. Please DO NOT break out information on a single item amongst multiple rows. In addition, DO NOT include gaps between rows (this includes the header row).

THE MORE ERRORS IN YOUR FILE, THE LONGER IT WILL TAKE TO OBTAIN YOUR NEW ITEM ID NUMBERS!

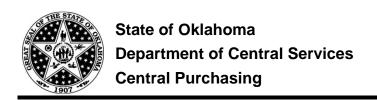# ITEM UPLOAD FORMAT FIELDS

Column A: Action = "A" for Add

❖ This column tells the Content Tool what action needs to be performed for the items on the template. Please put an "A" for Add (No quote marks)

❖ This column should look like the picture below when properly completed:

A
Action A=Add
A

Column C: Action = Item Description

❖ This column contains a detailed name and description for the item. This will be created by the Agency when they are requesting a new item number. The description MUST contain EVERYTHING the Requestor needs to identify what they are buying in a concise manner. See example below of the correct naming convention for the State of Oklahoma.

C
Long Item Description
COFFEE MAKER: 12 cup drip
COFFEE MAKER: 4 cup drip
CARAFE: Replacement 12 cup for coffee maker
CARAFE: Replacement 4 cup for coffee maker

❖ Specifications, Units of Measure, Brand Names and Models <u>DO NOT</u> need to be included in the Description column. Specifications need to be removed from the line level and stored in a document that will be attached to the purchase order or requisition at a later date.

❖ General Tips:
  o Each description for an Item must be unique, both among the other items on the request and among *all other items* within the PeopleSoft system.
  o When requesting any type of service to be performed, begin each description with "SERVICE:" then describe the service to be procured. All products will begin the description with what the actual item is called.
  o Remove any and all references to "See Attached Specifications"
  o <u>All the parts of a description need to be in a single cell, not spread out among several. Even if all the words do not "show", you can keep typing in a cell and not run out of room.</u>

EXAMPLE:

Correct:

A	B	C
Action A=Add		**Long Item Description**
A		COFFEE MAKER: 12 cup drip
A		BOX:12 x 12 x 9, corrugated
A		LIGHT BAR: Police Flashing LED-Red-Blu-White
A		SERVICE: Design, implement & manage Easy Savings Program
A		COVER: Golf Course Green cover - order by sq ft

Incorrect:

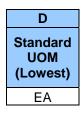| A	B	C
Action A=Add		**Long Item Description**
A		COFFEE MAKER:
A		12 cup drip
A		LIGHT BAR:
A		Police Flashing
A		LED-Red-Blu-White

If your description is too long to be displayed in your spreadsheet, do the following:

- ✓ Highlight the "Description" column by clicking in the blue "C" at the top of the page.
- ✓ When the column is highlighted, click on "Format" at the top of the screen.
- ✓ Choose "Cells" from the menu that appears.
- ✓ Click the "Alignment" tab.
- ✓ In the "Text Control" section of the "Alignment" tab, check the box for "Wrap Text".
- ✓ Click the "OK" button.

This expands your cell out to display your entire description.

Column D: Standard Unit of Measure: Lowest

D
Standard UOM (Lowest)
EA

❖ This column shows the lowest unit of measure used when issuing an item. <u>If the item is held in inventory, this is the lowest amount it will be "broken up" into before being distributed.</u> Generally, this is "each". This <u>MUST</u> be a valid ANSI code. This is the basic Unit of Measure used for the item. A listing of valid ANSI units of measure is located on the Purchasing Division's website at the following link. (http://www.ok.gov/DCS/Central_Purchasing/Item_Maintenance). This information is <u>REQUIRED</u>.

Column J: Minimum Ordering Quantity:

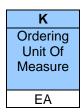| J |
|---|
| **Minimum Order Quantity** |
| 1 |

❖ This column contains the minimum quantity that can be ordered for this new item. Generally, this is always a "1".

Column K: Ordering Unit of Measure Conversion:
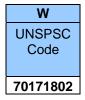
K
Ordering Unit Of Measure
EA

❖ This column demonstrates the conversion rate from the lowest/standard Unit of Measure (Column D) to the Ordering Unit of Measure (Column K). For example, the lowest Standard UOM could be EA (Each) but the Ordering UOM is CA (Case).

❖ The "Ordering UoM Conversion (Column K) <u>will always be an alpha character.</u> <u>Never a number.</u>

Column L: Ordering Price:

L
Ordering Price
0.01

❖ This column contains the ordering price on the item. When requesting a new contract or a reprocurement of an existing contract, it must be something other than zero (0). If unsure of the price OR if the price may fluctuate, enter 0.01 into the column. DO NOT ADD THE $ sign. <u>This information is required</u>.

Column W: UNSPSC Code (Required):

W
UNSPSC Code
70171802

❖ This column contains the UNSPSC Category code for the item. This number will always consist of 8-digits. Descriptions of the available codes can be found at www.unspsc.org. A search can be performed via descriptor or by partial code using a wild card symbol of "%".

Column Y: UNSPSC Code Description (Required):

Y
UNSPSC Code Description
Storm Water Drainage

❖ This column contains the UNSPSC Category code description chosen for the item. This will be copied directly from the www.unspsc.org website. Please do not add your own description here. This will result in a loading error.

❖ Save this spreadsheet and submit as a file attachment to CPO_Items@dcs.state.ok.us. Your request will be processed for loading and an email will be returned to you with the new item ID number. The standard turn-around time is within a 24 hour period. In most cases, this time will be less but in isolated instances, this time could be longer. Communication from Item Maintenance Team will keep you apprised of the situation.

❖ Should you need additional assistance, you can call the Item Maintenance Help Desk @ (405) 522-3368.